

Allied Financial Software Knowledgebase

Simple Import Single User 4 Advisors 3.0 from ACT! 2006/2007/2008/2009

Simple Import Single User 3.0:

Note: If you are importing from an existing Act4Advisors database or ACT! 6.0 - please convert your database first before importing data.

The very first thing you should do is change the ME record in the Advisor35 database. Go to Tools, Manage Users, highlight the record ME and edit user information. Enter in the exact information as it is in the existing database. For example; if you were logging in as Kathy with no password and the contact name for the record was Kathleen Newman this is what you need to enter in the Advisor35.

Go to Tools, Preferences, click on the Duplicate Checking button. Uncheck Enable duplicate checking for the database. And press OK.

After that is done, close act, and reopen. Now log in with new user and password&

You are now ready to import your data.

Go to File Import.

Locate your existing database

If you have customized the database you will need to locate your custom fields and map to Advisor30 fields. For example; if you have created a field called SSN because act did not have this field Locate this field and map by clicking on the empty field directly across from it and locate 1SSN Contact.

Press Next for Group and Opportunity Map

Check Include other users public activities and Click on Contact Merge Options

Click on Restore Defaults and press OK

Press Finish
Technorati

<http://kb.actforadvisors.com/questions.php?questionid=4>